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Report Highlights:

The Indonesian poultry industry is staging a remarkable comeback after being severely shaken by the economic crisis which struck in mid 1997. FAS/Jakarta forecasts that MY01 poultry production will reach 800,000 mt with corresponding feed demand of 4.8 mmt. MY00 poultry production is estimated at 734,000 mt, up 18 percent from MY99 production which was 622,430 mt. Imports are also up significantly, to 20,000 mt in MY01 following an increase of 124 percent in MY00 to 10,000 mt. FAS/Jakarta forecast egg production for MY01 at 11.0 billion pieces and imports at 500 mt.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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I. SITUATION AND OUTLOOK

POULTRY MEAT

Production

After experiencing a major set back during the crisis, which bottomed out in 1998, the poultry industry has shown faster than anticipated recovery. Assuming economic and political stability, Post forecasts that poultry meat production will reach 800,000 mt in MY01. This is still below pre crisis level of 890,000 mt. Reflecting increased production of Day Old Chicks (DOC), the forecast for broiler meat production in MY00 is 734,000 mt, which is 56 percent of the total national meat supply, 1.3 mmt. The production in MY00 increased a remarkable 18 percent from MY99 (622,430 mt). Of that total of poultry meat produced, 47 percent was broiler meat, 46 percent was indigenous chicken meat, followed by spent layer meat 4 percent and 3 percent duck meat. Seventy percent of poultry production is carried out through contract or partnership and 30 percent by independent farmers.

Large poultry integrators (own poultry farms and feed production facility) such as Charoen Phokpand, Japfa, Anwar Sierad, Cimanggis, Cipendawa, Wonokoyo and Cibadak, are among the few survivors of the crisis. To the victors go the spoils : more than 80 percent of the poultry market. Whereas, many small farms have closed or are still struggling to rebuild their capital to return to the business.

Naturally, the recovery of the poultry industry has a strong effect on the growth of the feed mill industry. Eighty percent of the cost of production in the poultry industry is from feed and about 40 percent of the feed ingredients are imported. Therefore, feed millers are still greatly affected by fluctuations in the dollar - rupiah exchange rate, which continues to move erratically. For example in 2000, the exchange rate has ranged from Rp 7,400 to Rp 9200 / US \$ 1.

Based on reports from the industry, post forecasts feed production will reach up to 6 mmt in MY01 surpassing the pre-crisis level of about 4.8 mmt in 1997. This is still only 50 percent of the total national capacity of the industry which is 10 mmt. Thus leaving plenty of room for continued growth. Post estimates that Indonesia's feed consumption for MY00 will be 4.2 mmt, up 15 percent from last year, or 3.6 mmt.

DOC production has also shown great improvement this year after a major shortage of DOCs in 1999 both in layer and broiler DOC terms. With respect to broilers, production for MY00 is estimated to increase by about 50 percent compared to MY99 production, to approximately 15 million head/week. That brings DOC - broiler production up to 70 percent of the pre-crisis level (22 million head/week). Based on current trends and reports from the industry, Post forecasts that MY01 production of DOC- broilers will be 20 million head/week.

It is estimated that 700,000 birds/day are slaughtered. Out of that, only about 20 percent go to slaughter houses and the rest go directly to the wet market. The average weight of live birds to be slaughtered is relatively low at between 1.3 to 1.5 kg. There are limited numbers of chicken slaughtering and processing facilities, whether medium or large scale. Only about 14 slaughter houses exist and these modern chicken slaughter houses are usually located far from the center of distribution. Their products tend to be marketed to supermarkets, restaurants and hotels, not yet to traditional

markets because they can not compete in price. In addition, there is still a preference among low to middle income Indonesians to purchase a live chicken for slaughter at the wet market.

Consumption

The MY01 forecast is 820,000 mt (or 3.8 kg/capita/year), based on expectation of economic growth. Expectations of moderate growth and evidence that poultry meat is being used as a substitute for beef lead Post to forecast poultry consumption of chicken meat in Indonesia at 741,000 mt (or 3.5 - 3.6 kg/capita/year) in MY00, notably higher than consumption during the crisis, 448,000 mt (or 2.2-2.4 kg/capita/year). For a city like Jakarta, in which more people have greater purchasing power, consumption is as much as 20 kg/capita/year. The growth of fast food outlets has encouraged a strong demand for chicken products.

Trade

The increasing demand for poultry meat, together with lower supply of local product and competitive prices of imported broiler meat have created an opportunity for chicken importers to enter the market. It is forecast that poultry imports for MY01 will increase dramatically to 20,000 mt, double MY00 imports. For MY00, importers report that more poultry meat will be imported, given that imports are more competitively priced than local poultry. Thus, if the currency is stable at Rp 8,000 / US\$ 1, Post forecasts MY00 imports of around 10,000 mt, with 90 percent chicken parts. Poultry imports for MY1999 reached 4,462 mt (691 mt whole birds and 3,771 mt chicken parts), 6 times MY98 imports, or 738 mt (541 mt whole birds and 197 tons chicken parts). Major suppliers included the United States (76%), Australia (8%) and Brazil (7%). The United States is the major importer country because of its high quality and competitive prices. Preliminary data indicate that during the first 3 months of MY00 (January-March) poultry meat imports have reached 1,400 mt (164 mt whole birds and 1,236 mt chicken parts), almost double that of the same period last year, or 722 mt.

Poultry exports are limited due to domestic use and relatively low production efficiency. In MY01, Post forecasts only 3,000 mt of exports, this is on par with MY00 exports of 2,859. About eighty percent of total exports went to Japan in the form of chicken parts.

Prices

Farm gate prices for live broilers reportedly dropped by 23 percent from Rp 7,565 (Jan 2000) to Rp 6,100 (Aug 00) at the Jakarta market. The retail prices at the traditional market in Jakarta for chicken meat also declined from Rp 12,525/kg (Jan 00) to Rp 10,800/kg (Aug 00) and at supermarkets in Jakarta from Rp 14,788/kg (Jan 00) to Rp 13,608/kg (July 00).

In December 1999, the price of poultry meat was about Rp 12,000-14,000/kg for local and about Rp 7,000 - 9,000/kg for imported product. However, the first week of August 2000 shows that local product is about Rp 9,000 - 10,000/kg for both local and imported products. It is anticipated that the local price will increase again in line with the increasing price of poultry feed if the Rupiah weakens.

DOC broiler prices are still very fragile. Prices fluctuate dramatically, for instance they bounced from Rp 3,000 to Rp 500 in the first quarter of 2000. Currently prices are hovering around Rp 2,000.

Policy

The import tax on poultry meat remains at 5 percent. According to the Ministry of Agriculture's Directorate General (DG) for Livestock, import approval from the DG is no longer required. As of November 1999, general importers are allowed to import poultry and its products. However they still must inform DG : the type of chicken imported, volume, original country, port and market destination and the code number of slaughtering house.

Although the Government of Indonesia (GOI) reports no change in import policy for the last ten years, there has been a noticeable increase in inspection of poultry imports for Halal certification in MY00. The Ministry of Agriculture's Directorate General (DG) for livestock recently announced the addition of one U.S. Islamic Center to the approved list. Currently from U.S centers are approved including: Islamic Food and Nutrition Council of America (IFANCA), Islamic Food Authority, Inc. USA, Islamic Center of Omaha, and International Institute of Islamic Thought c/q Marjac Abattoir. The GOI also maintains control over the internal distribution of poultry away from traditional markets in an effort to protect domestic producers. Thus, imported poultry is only allowed to be distributed to the food industry (i.e. supermarkets), hotels or restaurants.

Since 1999, poultry farm companies are free to diversify and expand business. The poultry farming business was removed from the Negative Investment List (a list which limits or prohibits foreign investment) as the GOI and domestic investors lack the investment capital. This now opens the door for foreign investors to establish breeding farms or feedmills in West Java, East Java or Central Java. This could help local companies who want to integrate their businesses from upstream to downstream lines of business.

In a separate action, in July 2000, the GOI released a Presidential Decree (No 85/2000) that revoked a requirement on foreign poultry producers to export 65 percent of production. Now foreign companies can invest without any requirements on exports.

Investment

Recently, most local investors are not expanding their plants. They are reportedly waiting for the domestic political and economy situation to settle. The stability of the rupiah, in particular, is being watched very closely.

Poultry Eggs

Production

Poultry egg production is expected to increase dramatically in MY01. Post forecasts total production will reach 11.0 billion pieces (including indigenous eggs and layer eggs). This would bring production close to the pre-crisis level. It is estimated that egg production for MY00 is increasing to 9.0 billion, up 10 percent compared to the production in

MY99 of 7.9 billion eggs and 70 percent from MY98. The production of DOC layer for MY00 is estimated to reach 1.15 million/week, slightly higher than the previous year which was 1.10 million/week.

During the shortage of DOC in MY99, egg prices were very good and profitable for farmers. However, after the domestic stock was renewed, egg prices has dropped 30 percent, from Rp 7,500/kg (Jan 00) to Rp 5,300/kg.

The layer farming business is still not attractive for most farmers due to the slow turn over compared to broiler farms. The first semester of MY00 showed that the DOC layer price was relatively stable at Rp 4,500. However it went down gradually to Rp 2,500, due to the increased stock of layers. According to industry sources, layer farms will be facing heavy losses this year unless both breeding and layer farm scales down their operations for the rest of 2000.

Consumption

Post forecast egg consumption in Indonesia for MY01 will reach 11.0 billion pieces (or 52 pieces/capita/year) for MY01. This is slightly lower than the consumption before crisis in MY96, which was about 11.5 billion pieces (or 65 pieces/capita/year). Egg consumption for MY00 will reach 9.0 billion pieces (or 42 pieces/capita/year), 14 percent higher than the previous year of 7.9 billion pieces (or 38 pieces/capita/year). Compared to other animal protein sources, eggs are still the cheapest, although eggs are still more expensive than tofu and tempe as protein sources. Therefore, when the price of eggs drops and purchasing power improves, egg consumption will increase.

Trade

Egg imports are expected to decline in MY00 and MY01 after playing catch up in MY99. Imports for MY01 are forecast at 500 mt. Based on imports as of March 2000 of 209 mt, the MY00 estimate is 600 mt. This comes after steep imports of 2,709 mt of eggs in MY99, reportedly in an effort to speed up DOC production to meet growing demand for poultry. Of the total 2,709 mt of eggs, 62 percent is fresh eggs for hatching, 30 percent is fresh eggs not for hatching and 8 percent is processed eggs . That compares to egg imports of 240-350 mt in 1997-1998. Major suppliers in MY99 were the Netherlands with 50 percent market share (1,355 mt) and Malaysia with 20 percent (557 mt).

II. STATISTICAL TABLE

PSD POULTRY MEAT

PSD Table						
Country:	Indonesia					
Commodity:	Poultry, Meat, Total					
				Million Head; 1000 MT		
		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Inventory (Reference)	66	66	85	85	0	85
Slaughter (Reference)	527	700	685	700	0	700
Beginning Stocks	0	0	0	0	0	0
Production	570	622	740	734	0	800
Whole, Imports	1	1	5	4	0	5
Parts, Imports	2	4	10	6	0	15
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	3	5	15	10	0	20
TOTAL SUPPLY	573	627	755	744	0	820
Whole, Exports	1	0	2	0	0	0
Parts, Exports	2	3	3	3	0	3
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	3	3	5	3	0	3
Human Consumption	570	624	750	741	0	817
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	570	624	750	741	0	817
TOTAL Use	573	627	755	744	0	820
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	573	627	755	744	0	820
Calendar Yr. Imp. from U.S.	2	5	5	0	0	0

Trade Matrix, Poultry Meat

Import Trade Matrix			
Country:	Indonesia	Units:	Metric Tons
Commodity:	Poultry Meat, Total		
Time period:	Jan-Dec		
Imports for	1998		1999
U.S.	351	U.S.	3,398
Others		Others	
China	234	Australia	342
Brazil	71	Brazil	303
Singapore	59	China	236
Australia	13	France	72
Malaysia	10	Singapore	53
		American Samoa	48
		New Zealand	3
Total for Others	387		1,057
Others not listed	0		7
Grand Total	738		4,462

Import Trade Matrix			
Country:	Indonesia	Units:	Metric Tons
Commodity:	Poultry Meat, Total		
Time period:	Jan-Mar		
Imports for	1999		2000
U.S.	666	U.S.	1,033
Others		Others	
China	44	Australia	84
Brazil	0	Malaysia	10
Singapore	3	China	114
Australia	10	France	120
		Singapore	4
		Thailand	36
Total for Others	57		368
Others not listed	0		0
Grand Total	723		1,401

Source : Central Bureau of Statistics

Export Trade Matrix			
Country:	Indonesia	Units:	Metric Tons
Commodity:	Poultry Meat, Total		
Time period:	Jan-Dec		
Exports for	1998		1999
U.S.	0	U.S.	0
Others		Others	
Japan	2,315	Japan	2,358
Kuwait	229	Kuwait	68
Bahrain	113	Bahrain	22
United Arab Emirate	112	United Arab Emirate	121
Saudi Arabia	70	Saudi Arabia	121
Oman	69	Oman	144
Hong Kong	24	Hong Kong	0
Thailand	23	Singapore	25
Philippines	22	Taiwan	0
Singapore	20		
Total for Others	2,997		2,859
Others not listed	0		0
Grand Total	2,997		2,859

Export Trade Matrix			
Country:	Indonesia	Units:	Metric Tons
Commodity:	Poultry Meat, Total		
Time period:	Jan-Mar		
Exports for	1999		2000
U.S.	0	U.S.	0
Others		Others	
Japan	863	Japan	95
Oman	46		
Saudi Arabia	23		
Total for Others	932		95
Others not listed	1		1
Grand Total	933		96

Source : Central Bureau of Statistics

PSD Poultry Eggs

PSD Table						
Country:	Indonesia					
Commodity:	Poultry, Eggs					
		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Layers	42	45	45	45	0	45
Beginning Stocks	0	0	0	0	0	0
Production	7950	7900	9540	9000	0	11000
Hatch Eggs, Imports	3	2	0	2	0	1
Shell Eggs, Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
Intra EC Imports	0	0	0	0	0	0
TOTAL Imports	3	2	0	2	0	1
TOTAL SUPPLY	7953	7902	9540	9002	0	11001
Hatch Eggs, Exports	0	0	0	0	0	0
Shell Eggs, Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
Intra EC Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Hatch Eggs, Consumption	3	2	0	2	0	1
Shell Eggs, Human	7950	7900	9540	9000	0	11000
Shell Eggs, OT. Use/Loss	0	0	0	0	0	0
Other Dom. Consumption	0	0	0	0	0	0
Total Dom. Consumption	7953	7902	9540	9002	0	11001
TOTAL Use	7953	7902	9540	9002	0	11001
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	7953	7902	9540	9002	0	11001
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Trade Matrix, Poultry Eggs

Export Trade Matrix			
Country:	Indonesia	Units:	Metric Tons
Commodity:	Poultry, Eggs		
Time period:	Jan-Dec		
Exports for	1998		1999
U.S.	0	U.S.	0
Others		Others	
Thailand	237	Brunei Darussalam	87
Singapore	3	Malaysia	61
		Singapore	53
		Vietnam	2
		Hong Kong	1
Total for Others	240		204
Others not listed	0		0
Grand Total	240		204

Export Trade Matrix			
Country:	Indonesia	Units:	Metric Tons
Commodity:	Poultry, Eggs		
Time period:	Jan-Mar		
Exports for	1999		2000
U.S.	0	U.S.	0
Others		Others	
Singapore	12	Taiwan	2
Brunei Darussalam	2	Hong Kong	0
Total for Others	14		2
Others not listed	0		0
Grand Total	14		2

Source : Central Bureau of Statistics

Import Trade Matrix			
Country:	Indonesia	Units:	Metric Tons
Commodity:	Poultry, Eggs		
Time period:	Jan-Dec		
Imports for	1998		1999
U.S.	6	U.S.	23
Others		Others	
China	40	Netherlands	1,355
France	40	Malaysia	557
Belgium	40	Norway	482
Hong Kong	32	Australia	83
India	26	Germany	36
Australia	15	United Kingdom	25
Singapore	12	India	54
South Africa	6	China	52
		Singapore	13
Total for Others	211		2,657
Others not listed	11		29
Grand Total	228		2,709

Import Trade Matrix			
Country:	Indonesia	Units:	Metric Tons
Commodity:	Poultry, Eggs		
Time period:	Jan-Mar		
Imports for	1999		2000
U.S.	5	U.S.	0
Others		Others	
Australia	31	Malaysia	148
Netherlands	20	Netherlands	53
Malaysia	19	Australia	16
Singapore	6	Singapore	10
China	6	India	5
South Africa	4		
United Kingdom	2		

Total for Others	88		232
Others not listed	0		9
Grand Total	93		241

Prices Table			
Country:	Indonesia		
Commodity:	Poultry, Meat, Total		
Year:	2000		
Prices in (currency)	Rupiah	per (KG)	
Year	1999	2000	% Change
Jan	13250	12525	-5.5%
Feb	12750	10838	-15.0%
Mar	13000	10363	-20.3%
Apr	12550	9983	-20.5%
May	12213	10150	-16.9%
Jun	13203	10788	-18.3%
Jul	12525	7779	-37.9%
Aug	12150	6650	-45.3%
Sep	10863		-100.0%
Oct	11150		-100.0%
Nov	11513		-100.0%
Dec	12670		-100.0%

Source : Center for Market Information, the Ministry of Industry and Trade
Retail Prices at the Jakarta Market

Prices Table			
Country:	Indonesia		
Commodity:	Poultry, Eggs		
Year:	2000		
Prices in (currency)	Rupiah	per Kg	
Year	1999	2000	% Change
Jan	8795	8535	-3.0%
Feb	8478	6800	-19.8%
Mar	8093	7180	-11.3%
Apr	9050	6135	-32.2%
May	8133	6065	-25.4%
Jun	8246	6651	-19.3%
Jul	8313	6843	-17.7%
Aug	7863	6310	-19.8%
Sep	6783		-100.0%
Oct	6343		-100.0%
Nov	7535		-100.0%
Dec	8314		-100.0%

Source : Center for Market Information, the Ministry of Industry and Trade
Retail Prices at the Jakarta Market

Live Broiler Farmgate Prices in 1999
(Rupiah per Kilogram)

Area	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Sumatera	8,240	8,080	8,283	8,380	7,960	8,620	8,420	6,895	6,205	6,040	7,560	8,775
Jakarta	8,375	8,033	6,775	7,633	7,433	8,400	8,562	6,278	4,793	5,600	7,773	8,300
West Java	8,467	8,056	6,556	7,644	6,744	7,856	8,011	6,164	4,978	5,708	7,742	8,300
Central Java	8,160	8,380	6,230	7,295	6,910	7,610	7,905	5,858	4,862	5,340	7,298	8,042
Yogyakarta	8,150	8,450	7,150	6,950	6,800	8,100	7,950	5,975	4,825	5,225	7,125	8,075
East Java	7,562	8,029	6,786	7,043	6,957	7,771	7,907	5,935	4,729	5,276	7,009	7,960
Bali	8,000	9,000	7,500	7,600	7,700	8,700	8,400	6,650	5,125	5,875	7,550	8,200
Kalimantan & KTI*	10,100	9,471	8,543	9,293	9,529	9,314	9,869	9,318	8,382	8,196	9,118	10,850
Average Prices	8,382	8,437	7,228	7,730	7,504	8,296	8,378	6,634	5,487	5,908	7,647	8,563

Source : Info Pinsar (National Poultry Information Center)

*KTI : Eastern Indonesia Regions

Broiler Farmgate Prices 2000
(Rupiah per Kilogram)

Area	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Sumatera	8,910	6,833	6,480	5,984	6,250	7,805	9,373	7,208				
Jakarta	7,567	6,080	5,967	5,629	6,589	7,507	7,535	6,362				
West Java	7,817	5,937	5,867	5,687	6,574	7,214	7,149	5,906				
Central Java	7,945	5,653	5,750	5,386	6,115	6,748	6,854	5,510				
Yogyakarta	8,350	5,667	5,833	5,320	6,125	6,600	6,900	5,650				
East Java	8,617	5,652	5,188	5,204	5,947	6,458	7,124	5,917				
Bali	8,650	6,267	5,667	5,500	6,300	6,725	7,560	6,450				
Kalimantan & KTI*	11,250	8,926	9,531	8,876	8,393	8,655	9,734	9,107				
Average Prices	8,638	6,377	6,285	5,948	6,537	7,214	7,779	6,514				

Source : Info Pinsar (National Poultry Information Center)

*KTI : Eastern Indonesia Regions

Layer Egg Farmgate Prices in 1999
(Rupiah per Kilogram)

Area	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Sumatera	7,510	6,436	7,438	7,349	6,666	7,243	6,896	5,873	5,193	5,020	6,012	7,030
Jakarta	8,200	7,200	8,000	7,900	7,000	7,900	7,800	6,600	5,900	5,600	6,750	7,875
West Java	8,086	7,229	7,643	8,029	7,043	7,957	7,779	6,605	5,893	5,629	6,647	7,792
Central Java	7,917	6,789	8,011	7,617	7,067	7,567	7,667	6,570	5,817	5,597	6,587	7,692
Yogyakarta	7,700	6,500	7,700	7,300	6,900	7,400	7,800	6,333	5,900	5,525	6,575	7,525
East Java	7,520	6,350	7,838	7,478	6,705	7,450	7,495	6,252	5,582	5,427	6,560	7,519
Bali	8,250	8,085	8,250	7,838	7,838	8,085	8,250	7,333	6,000	6,600	7,280	6,840
Kalimantan & KTI*	10,312	7,941	8,601	9,280	9,415	10,375	9,644	8,564	7,752	7,306	8,602	9,268
Average Prices	8,187	7,066	7,935	7,849	7,329	7,997	7,916	6,766	6,005	5,838	6,877	7,693

Source : Info Pinsar (National Poultry Information Center)

*KTI : Eastern Indonesia Regions

Layer Egg Farmgate Prices in 2000
(Rupiah per Kilogram)

Area	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Sumatera	6,440	5,057	5,821	4,724	4,936	5,567	5,726	4,992				
Jakarta	7,300	6,033	6,600	5,320	5,525	5,950	6,080	5,250				
West Java	7,239	5,948	6,441	5,276	5,420	5,834	5,925	5,075				
Central Java	7,345	5,743	6,630	5,176	5,421	5,802	5,881	4,975				
Yogyakarta	7,250	5,800	6,533	5,260	5,425	5,725	5,880	4,950				
East Java	6,938	5,685	6,289	4,934	5,180	5,460	5,609	4,665				
Bali	8,000	6,720	6,373	5,824	5,720	6,000	6,224	5,520				
Kalimantan & KTI*	9,621	7,637	8,014	8,987	6,936	7,436	7,585	7,016				
Average Prices	7,517	6,078	6,588	5,687	5,570	5,972	6,114	5,305				

Source : Info Pinsar (National Poultry Information Center)

*KTI : Eastern Indonesia Regions

**Average Retail Prices of Poultry Meat Compared to Beef Meat 1999
at the Jakarta Market**

Month	Beef (Rp./Kg)	Poultry Meat (Rp./Kg)
January	26,113	13,250
February	26,875	12,750
March	26,463	13,000
April	25,975	12,550
May	26,113	12,213
June	25,681	13,203
July	25,500	12,525
August	25,450	12,150
September	25,375	10,863
October	25,150	11,150
November	25,125	11,513
December	26,540	12,670

Source : Center for Market Information, the Ministry of Industry and Trade

**Average Retail Prices of Poultry Meat Compared to Beef Meat 2000
at the Jakarta Market**

Month	Beef (Rp./Kg)	Poultry Meat (Rp./Kg)
January	28,575	12,525
February	26,825	10,838
March	26,675	10,363
April	27,550	9,983
May	27,700	10,150
June	27,500	10,788
July	27,500	11,200
August	27,200	10,800
September		
October		

November		
December		

Source : Center for Market Information, the Ministry of Industry and Trade

Exchange Rate (Rupiah /US\$ on a Period Ending Basic)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1997	2387	2403	2418	2443	2458	2450	2528	2190	3350	3700	3740	5700
1998	13513	9377	8740	8211	10767	15160	13850	11700	11314	9142	7755	8100
1999	9419	8992	8778	8632	8179	6750	6989	7736	8571	6949	7439	7161
2000	7414	7517	7598	7988	8728	8735	9003	8235				

Source : Bisnis Indonesian Daily

Poultry Meat and Poultry Egg Tariffs

Harmonized System Code	Description of Goods	2000	VAT	1999	VAT
	(H.S. Number)	Import		Import	
		Duty		Duty	
		(%)	(%)	(%)	(%)
0207	Meat and edible offal of				
	the poultry of heading				
	No. 0105, fresh, chilled or frozen				
	of fowls of the species				
	Gallus domesticus				
0207.11.000	Not cut in pieces, fresh or chilled	5	0	5	0
0207.12.000	Not cut in pieces, frozen	5	0	5	0
0207.13.000	Cuts and offal, fresh or chilled	5	0	5	0
0207.14.000	Cuts and offal, frozen of turkey	5	0	5	0
0207.24.000	Not cut in pieces, fresh or chilled	5	0	5	0
0207.25.000	Not cut in pieces, frozen	5	0	5	0
0207.26.000	Cuts and offal, fresh or chilled	5	0	5	0
0207.27.000	Cuts and offal, frozen of ducks,	5	0	5	0
	gees or guinea fowls				
0207.32.000	Not cut in pieces, fresh or chilled	5	0	5	0
0207.33.000	Not cut in pieces, frozen	5	0	5	0
0207.34.000	Fatty livers, fresh or chilled	5	0	5	0
0207.35.000	Other, fresh or chilled	5	0	5	0
0207.36.000	Other, frozen	5	0	5	0
0407	Bird's eggs, in shell, fresh				
	preserved or cooked				
	fresh				
0407.00.110	for hatching	0	0	0	0
0407.00.120	not for hatching	5	0	5	0

Source : 2000 Government of Indonesia Tariff Book

**Poultry Demand
Strategic Indicator Tables For Indonesia**

ANIMAL INVENTORIES-Beginning of Year (in heads)				
Country: Indonesia		Last Year	Current Year	Out Year Forecast
Report Year: 2000	1998	1999	2000	2001
Poultry (including ducks)	670,758,246	677,634,803	779,029,957	854,093,701
Hogs	7,489,018	7,041,820	7,262,970	7,404,205
Dairy Cattle	321,956	332,031	346,922	369,384
Goats	13,342,075	12,701,373	13,065,734	13,609,692
Beef Cattle & Buffalo	14,221,309	13,779,491	14,204,876	14,590,716
MEAT PRODUCTION (in metric tons)				
Country: Indonesia		Last Year	Current Year	Out Year Forecast
Calendar Year: 2000	1998	1999	2000	2001
Poultry				
Poultry Meat (including ducks)	620,071.2	622,430.4	733,999.6	802,225.5
Eggs (not including ducks)	392,661.9	524,565.4	576,072.3	634,927.9
Pork	132,253.7	136,815.2	142,921.9	151,518.3
Beef & Buffalo	381,873.5	356,875.7	401,914.3	412,085.1
Goat	45,058.9	45,027.9	47,770.7	52,212.7
COMPOUND FEED SECTOR (in 1,000 mt)				
Country: Indonesia		Last Year	Current Year	Out Year Forecast
Calendar Year: 2000	1998	1999	2000	2001
Compound Feed Capacity	8,225	10,000	10,000	10,000
Total Compound Feed Produced	2,538	3,600	4,200	4,876
----- by integrated producers	1,150	2,433	3,010	3,876
----- by commercial producers	1,388	1,451	1,290	1,000

PROTEIN - ENERGY USAGE (in 1,000 mt)				
Country: Indonesia		Last Year	Current Year	Out Year Forecast

Marketing Year	1998/99	1999/2000	2000/2001	2001/2002
Total Protein Meal (feed waste domestic consumption)				
Soy Bean Meal (feed waste domestic consumption)	800	1,110	1,200	1,320
Other Protein Meal:				
Palm Kernel Meal (feed waste domestic consumption)	50	50	60	66
Rape Meal (feed waste domestic consumption)	51	4	5	5
Fish Meal (feed waste domestic consumption)	40	71	85	100
Sunflower Meal	3	0	0	0
Cottonseed Meal	0	0	0	0
Feather Meal	0	0	0	0
Meat Meal	3	0	0	0
Palm Oil (feed waste domestic consumption)	30	33	33	35
TRADE (in 1,000 mt)				
Country: Indonesia		Last Year	Current Year	Out Year Forecast
Calendar Year: 2000	1998	1999	2000	2001
Corn				
Imports:	538	414	300	400
Exports:	561	110	200	100
Soy Beans				
Imports:	720	1,093	1,300	1,400
Exports:	0	0	0	0
Soy Bean Meal				
Imports:	571	1,047	1,240	1,360
Exports:	1	0	0	0
Fish Meal				
Imports:	35	72	75	78
Exports:	20	1	0	0
Sunflower Meal				
Imports:	3	0	0	0
Exports:	18	0	0	0
Rape Meal				
Imports:	51	4	5	5

Exports:	0	0	0	0
Cottonseed Meal				
Imports:	0	0	0	0
Exports:	10	0	0	0
Feather Meal				
Imports:	0	0	0	0
Exports:	0	0	0	
Meat Meal				
Imports:	3	0	0	0
Exports:	0	0	0	0
Peanut Meal				
Imports:	30	6	12	20
Exports:	4	0	0	0
Palm Oil				
Imports:	18	3	5	5
Exports:	2,042	3,405	3,540	3,720
TARIFFS AND TAXES				
Country: Indonesia				Other
Report Year: 2000	Product	Bound Rate	Applied Rate	Import
HS Code:	Description	(%)	(%)	Taxes/Fees
505.9	Feather Meal	n.a	n.a	n.a
1501.00.00.60	Yellow Grease	40	5	10
1502.00.00.40	Inedible Tallow	40	5	10
1511	Palm Oil	40	0	10
1518	Anml/Vg Fats & Oils	40	5	10
2301.10	Meata & Bone Meal	40	0	10
2301.20	Fish Meal	40	0	10

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